Retirement Capital

Alexander Chapel Associates SSAS Pension Scheme

Venture Wales Building

Merthyr Tydfil Industrial Park

Pentrebach

Merthyr Tydfil

Mid Glamorgan

CF48 4DR

04/01/2023

Investor number: 31275146

Dear Sir/Madam

Pension transfer for Jonathan Church - Retirement Capital

The above client has requested the benefits under the above policy be transferred in cash, to their Aegon pension plan. Please find enclosed the relevant documentation to complete this transfer.

Transfer funds should be paid to:

Aegon

Sort Code: 40-02-50

Account Number: 81429671

Reference: 81000729-Church

If you’re unable to transfer funds electronically, please send a cheque payable to Aegon, to our address as detailed on this letter.

We will accept contracted-out liabilities arising from Guaranteed Minimum Pension (GMP)/ Section 9(2B) rights, only if converted to cash prior to transfer and paid to us as a CETV.

If the transfer is subject to an earmarking court order, or a bankruptcy, we won’t process this application until we receive copies of the documentation and the details listed. Aegon reserves the right to decline such a transfer.

If any part of the transfer payment is subject to a court order issued under Section 23 of the Matrimonial Causes Act 1973 or Section 8 of the Family Law (Scotland) Act 1985 (in other words an earmarking order following a members divorce), please include with the application:

* A copy of every such court order, including any varying order, together with details of the split of the fund(s).
* Details for the member’s former husband, wife or civil partner, their address and payment details (including any charges)
* If the transfer payment includes benefits which are subject to a pension attachment order (also known as an earmarking order), any notices given by the trustees of that scheme to the trustees of the transferring scheme.

Where the transfer payment includes an amount of pension credit in terms of Section 29 of the Welfare Reform and Pensions Act 1999, please provide the following:

* the amount of pension credit.
* If all or part of the pension credit arises as a result of a pension sharing order which took place after the scheme member had already taken benefits, please confirm the current value of the disqualifying pension credit, included in the pension credit, from which tax-free cash can’t be taken.

Please supply all required information regarding the benefits transferred to Aegon Cofunds Administration at the time of transfer.

Please also let us know if income will be forwarded after the date of transfer (please note that Aegon won’t accept income payments of less than £250). Cheques for outstanding income exceeding £250 can be written to Aegon and sent to Aegon Cofunds Administration at the above address. Please provide the investor information as detailed above with the cheque.

If you have any questions about this, please call our Customer Experience team on 0345 604 4001 or email aegoncofundsadministration@aegon.co.uk.

Yours sincerely



Graham Macleod

Head of Platform Operations